



Fortimize, a Salesforce Consultancy, to Host Banking-Focused Events During Dreamforce 2025 in San Francisco

Two days. Two events. One mission: helping banks and credit unions cut through the noise at Dreamforce 2025—powered by Fortimize's four-person team.

SAN FRANCISCO, CA, UNITED STATES, September 16, 2025 / EINPresswire.com/ -- Fortimize, a Salesforce consulting partner specializing in financial services, today announced it will host two exclusive client events in San Francisco during Dreamforce 2025.



Credit Union Connect Dinner with Salesforce on Tuesday, October 14, 2025 at Morton's The Steakhouse

“

We're grateful for the trust Salesforce and our partners place in us to host and lead these events.”

John Hamon

5:30 - 9:30 pm PST (seated diner)
Private, invite-only event. Contact your Salesforce representative for details.

Fueling Growth Breakfast with Blend on Wednesday, October 15, 2025 at S&S Lounge, Hotel Zetta
8 - 11 am PST (drop-in anytime)
Open to banks and credit unions. [RSVP required.](#)

The events underscore the firm's commitment to accelerating outcomes for banks and credit unions by showcasing practical, outcome-driven CRM strategies.

Championing the Future of Banking

Banks and credit unions are [modernizing customer engagement](#), and Fortimize helps put their teams at the center of that work—equipping them with trusted tools and clear strategies to drive

real outcomes.

A global lender reimagined loan management with Salesforce + nCino, while a \$10B regional bank unified scattered customer and account data so employees could better serve their communities. A mid-sized national bank launched its digital lending transformation, and a fast-growing community bank built a Salesforce CRM foundation to scale without losing its personal touch.

Credit unions are also pushing boundaries. A top 10 credit union stabilized a broken Salesforce + MuleSoft implementation, returning focus to member service. A federal credit union expanded lending access through Salesforce integration, while a specialty lender streamlined credit adjudication workflows—speeding decisions for borrowers when it matters most.

A top 10 mortgage provider optimized CRM and loan workflows to cut risk and reduce manual effort. Several institutions deployed Salesforce Data Cloud to turn fragmented records into advanced customer and member insights. And to help leaders move forward confidently, Fortimize designed a repeatable adoption playbook tailored for financial services.

Collectively, these engagements demonstrate measurable impact across lending operations, risk reduction, and member experience. When institutions are equipped with trusted platforms and clear strategies, their people—not the technology—become the true drivers of change.

Leadership in Attendance

Fortimize will be represented at Dreamforce 2025 by a four-person delegation, including John Hamon, CEO & Founder; James Murray, Banking; Josh Pinton, Real Estate; and Staci Tischer, Events & Marketing. John and James will lead banking conversations on October 14 and 15, while Josh and Staci will host additional real estate-focused meetings on October 15 and 16.

Building Momentum at Dreamforce

“Financial institutions no longer need to wait for large-scale digital transformations,” said John Hamon, Founder and CEO of Fortimize. “Our approach delivers measurable value within weeks, while ensuring clients have the flexibility to scale at their own pace.”

In addition to hosting its own events, Fortimize representatives will participate in industry discussions and client meetings in San Francisco during Dreamforce. The firm’s focus remains on helping banks, credit unions, and real estate companies unify customer data and build sustainable technology strategies.

About Fortimize

Fortimize is a team-owned Salesforce consultancy dedicated to supporting banks, credit unions,

and real estate firms. Since 2012, the company has delivered tailored technology solutions that streamline operations, strengthen client relationships, and enhance customer outcomes. Visit [Fortimize.com](https://www.fortimize.com) for more information.

Staci Tischer

Fortimize

[email us here](#)

Visit us on social media:

[LinkedIn](#)

[YouTube](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/849628815>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2025 Newsmatics Inc. All Right Reserved.